![USPS | mPOS logo]

Mobile Point of Sale Information Guide

Post Office:

mPOS Finance Number:

> For technical issues contact the mPOS Help Desk at 1-800-USPS-Help

mPOS Information Guide

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mPOS Overview

What is mPOS?

mPOS stands for Mobile POS or Mobile Point of Sale device. The mPOS device is an innovative and practical solution to speed simple transactions in retail lobbies. mPOS will enable the mPOS user to manage customers in the lobby more efficiently and quickly take care of simple customer needs. With the mPOS, mPOS users can conduct quick and easy transactions directly in the lobby, including credit card payment and non-PIN debit cards. (i.e. debit cards that can be ran as credit card)

mPOS users will be able to:

1. Scan prepaid barcoded packages for acceptance and provide customers with a choice of an email receipt and/or hardcopy printed receipt.

2. Sell select Forever stamp booklets and retail products such as Ready Post, greeting cards, and featured retail items.

3. Sell Priority Mail Flat Rate postage

4. Process "Delivered" Mail Pickups and have customers sign right on the mPOS device.

mPOS Security

Requesting Access

The mPOS device will require an Active Directory ACE ID. Users should request access to mPOS through eAccess.
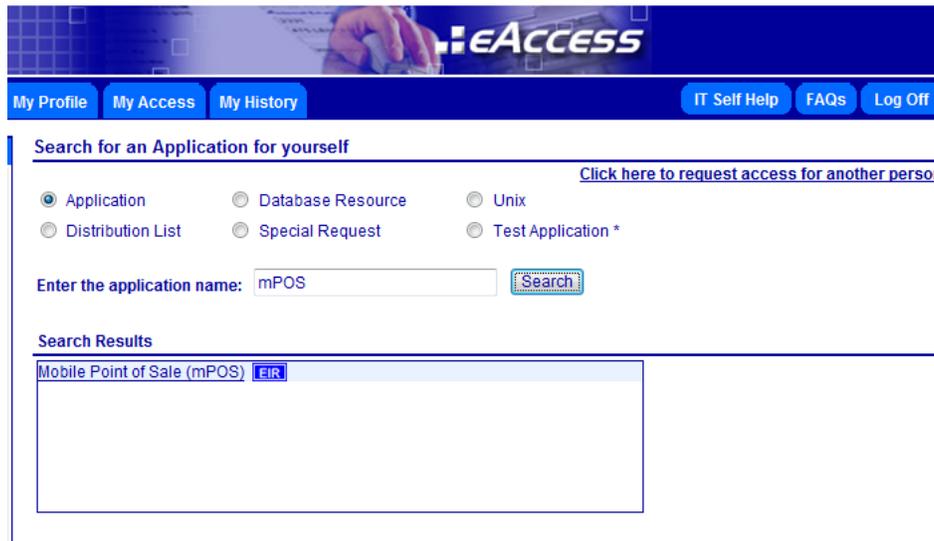
There are two options for mPOS roles: User Role and Supervisor Role.

- User Role: Users with the mPOS Users role can utilize all of the functionality of the mPOS device EXCEPT initiating a stamp count.

- Supervisor Role: Users with the mPOS Supervisors role can initiate stamp counts; however, they must have the User Role as well. Supervisor Role cannot be requested without also having the User Role.

Daily Log for Device and Stamp Booklets

Every mPOS office is required to maintain a daily log for tracking the use of the device and the stamp booklets that are taken to the lobby for sale. This log will be retained at the office with required quarterly stamp count results, and be available for inspection upon request.

1. Establish a log for each mPOS device in use at each location. (sample log in Appendix)

2. The mPOS user who will be operating the mPOS device will sign the Daily Log with the required information. Postmaster/Manager or Supervisor will initial the sign-in information provided by user.

3. The Daily Log provides space for the date, time of mPOS device receipt/return, mPOS user's name, and Postmaster/Manager or Supervisor initials, as well as number of stamp booklets signed out/in.

4. When control of the mPOS device and stamps are handed off from one user to another during the day, both employees will need to sign out/sign in the Daily Log to indicate possession.

5. The Daily Log will be returned to the Postmaster/Manager or Supervisor for secure storage or for reassignment to another Retail Associate.

6. The Daily Log will be securely stored; it will be reviewed on a weekly basis to ensure no data has been removed or changed.

Operational Security

Users should be trained on how to use the mPOS device and have the appropriate eAccess roles. Users should have taken LMS Course 10022027, "Protecting Payment Card Data – Retail Associates Training" (also required every two years for Sales and Service Associates).

The mPOS user will sign the Daily Log before receiving the mPOS device and stamp booklets, and when returning the mPOS device for reassignment or storage.

The mPOS user will maintain control of the mPOS device at all times while in use and should not leave unattended on lobby tables or carts.

mPOS Stamp Handling

mPOS Stamp Booklets are a separate accountability from full service POS stock and Self Service Kiosk (SSK) and must be kept in a locked security container separate from all other POS and SSK accountable inventory.

No more than 25 stamp booklets will be carried by the mPOS user at one time.

mPOS users must carry stamps on their person in a closed pouch or money belt provided. Stamp booklets must not be carried in hand, left loose in vest pockets or set down on counters.

Stamps must be signed out when they are removed from the locked security container. The quantity of stamps being issued will be annotated on the manual log at the same time that the mPOS device is being signed out. At the end of the mPOS user's shift, the stamps must be returned to the locked security container, and the quantity returned must be annotated on the log. When changing mPOS users, each user must sign in and out of the log to account for the stamps.

mPOS Functionality

mPOS Hardware

The mPOS unit consists of three devices – an mPOS device which is an iPod Touch with the mPOS App along with a receipt printer and a postage label printer.

mPOS Device

To turn on the mPOS, press the "On/Off" button at the top right hand corner of the mPOS device.

Note: since the mPOS device is an Apple iPOD device, messages may be received from Apple to update the iOS version. Do not install the software update from Apple. Select "Later".

Receipt Printer

To turn on the receipt printer hold the "On/Off" button down for five (5) seconds. A green light will illuminate on the printer to signify the printer is on. The receipt printer will turn off automatically after idling for sixty (60) minutes due to nonuse. If this happens, turn the printer back on by using the instructions above.

Postage Label Printer

To turn on the label printer, hold the "On/Off" button down for five (5) seconds. A green light will illuminate on the printer to signify the printer is on. The postage label printer also has an automatic turn-off after sixty (60) minutes of non-use. To avoid label errors, ensure that the label printer is turned on prior to sending a request to print a postage label.

The printer must be calibrated to ensure proper print on the labels and to use the "auto-peel" function. Calibration must also be performed when re-loading label rolls.

Ordering Consumables

mPOS Receipt paper and labels can be ordered through eBUY2 –

Receipt Paper - PSN 7690-17-000-0666 PSIN O7522MRP PAPER, THERMAL RECEIPT, DPP-450 PRINTER, 2.25 IN X 50 FT

mPOS Postage Labels - PSN 7690-17-000-0667 PSIN O7522ML LABEL,POSTAGE, THERMAL, DPP-250 PRINTER, 4 IN X 3 IN

Using the mPOS App

Press the "Main" button on the mPOS, located at the center bottom of the device to proceed.

Press the "Main" button, to turn the device on. Follow the instructions on the screen and slide the arrow bar to the right to access the mPOS main screen, as shown on the right. **Note: If screen is "locked" enter passcode 7500 to "unlock"**	
Select the "mPOS" application icon to enter the mPOS application.	
At the mPOS App login screen, enter your ACE ID and password. Select the "Sign In" button to start the mPOS application. Note: User roles to mPOS are active once requested and approved through eAccess.	

The Home Screen has four options:

Prepaid Acceptance – perform an acceptance scan on prepaid mail created online by customers using services such as Click-N-Ship and eBay.

Product Sales - complete a customer's purchase, such as stamp booklets, by scanning the item and accepting payment. Also, use this option for selling Priority Mail Flat rate postage.

Mail Pickup – scan a mail piece as delivered as a result of PS Form 3849, Delivery Notice/Reminder/Receipt.

Back Office - view past transaction, perform a Product Sale "Void" transaction, calibrate printer, receive and ship stock, enter stamp count or print reports.
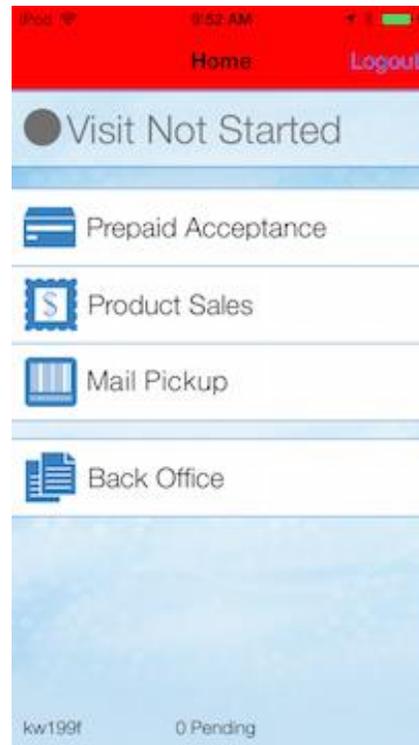
Prepaid Mail Acceptance

Choose the Prepaid Mail Acceptance option when scanning an online label or when applying a Label 400 on a prepaid metered mail piece. Also, as you would when accepting any package, don't forget to ask if there is anything liquid, fragile, perishable or potentially hazardous like lithium batteries or perfume.

1. Select the Prepaid Acceptance button on the main screen.

2. Hold the scanner six (6) inches from the prepaid barcode and scan by pressing the white textured button on the right of the mPOS device.

3. Aim the scanner "red and blue box" light at the middle of the label barcode. A beep will sound when the barcode is accepted.

4. Enter Destination zip code, if prompted

5. Check the mPOS device screen to ensure the device has picked up the barcode scanned. If the barcode number is not on the screen, repeat steps 3 – 4.

6. Repeat process until all customer mail pieces have been accepted, if applicable.

7. Press Scroll to view all of the scans.

8. Select the blue "Accept All Mail" button at the top of the screen after all mailpieces have been scanned.

9. If there are no other customer transactions, such as Product Sales or Mail Pickup, select "End Visit" to complete the transaction
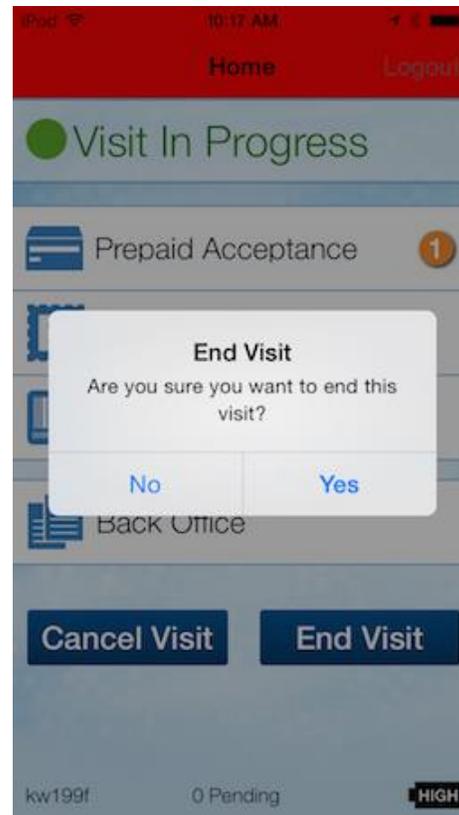
Form 5630 SCAN Forms

If a customer has multiple prepaid mail pieces with a Form 5630 SCAN, the form can be scanned instead of each individual mail pieces.

Scanning Form 5630 SCAN:
 	
1. Choose Prepaid Acceptance.
 	
2. Scan the barcode on the SCAN form.
 	
3. Answer the "Shipment Complete" question
 	
    a. "Yes" means the actual Package count matches the number on the SCAN form
 	
    b. "No" answer means that the count does not agree. Mail is still dispatched as normal	
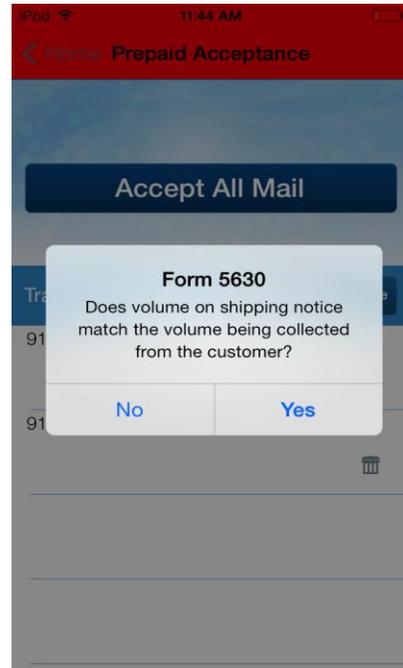
Providing Receipts

After all sales, prepaid mail, and/or mail pickup transactions, the mPOS App will provide a choice of email and/or hardcopy printed receipt. Duplicate receipts can be reprinted by going into the back office transaction log, selecting the transaction and choosing 'print'.

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For printed receipts: 1. Select one of the "Print" options. 2. Receipt will automatically print out of the receipt printer. 3. Retrieve the printed receipt. 4. Hand the printed receipt to the customer. NOTE: For customers who request both an e-mail and print receipt, the receipt will print automatically while entering e-mail information.	
For email receipts: 1. Request the customer's email address. 2. Type the address into the "To" field using the onscreen keypad. 3. Select the "Send" button to transmit. 4. Inform the customer the email has been sent.	
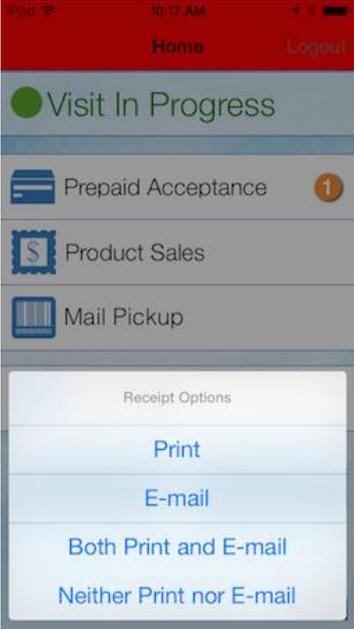
Product Sales

The Product Sales option is used for selling stamp booklets, ReadyPost, greeting cards and other non-Philatelic retail items. This option is also used for purchasing Priority Mail Flat Rate postage labels.

1. Select the "Product Sale" button on the main screen. 2. Scan the product barcode by pressing the button on the side of the device. 3. If the barcode cannot be read by the mPOS Device (in the example of a defaced barcode), select "*Manually Enter Barcode"* to key-in the SKU number using the virtual numeric keypad. 4. Following a successful scan or manual entry, mPOS adds the product as a line item entry to the customer's Shopping Cart. 5. Quantity can be changed by pressing the "-" or "+" 6. Select 'Continue' 7. Additional products can continue to be added to the cart or the visit can be ended, prompting for payment.	

Printing Priority Mail Flat Rate Postage Labels

Labels can be printed for Flat Rate Priority boxes or envelopes since they do not need a weight entered. As you would when accepting any package, don't forget to ask if there is anything liquid, fragile, perishable or potentially hazardous like lithium batteries or perfume.

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1. Scan the product barcode on Priority Flat Rate packaging 2. Enter the destination ZIP Code in the pop-up screen. 3. The mPOS Device will display the Destination Zip Code, calculated Postage Price and Insurance information. 4. Ask the customer if they accept the following terms of the Priority Mail Flat Rate Postage purchase before continuing.	
5. If customer accepts terms, select "Accept," and the postage will automatically print from the mPOS label printer. **Note: Ensure label printer is turned on prior to pressing "Accept".** 6. Remove the printed postage from the printer. If label auto-peel mode is not used, tear from the back of the printer. 7. Place postage on the customer's mail piece immediately. This is LIVE postage and must be used immediately since this is considered 'accepted' for mailing at time of printing. 8. Select the "Continue" button to return to the Home screen. 9. If there are no more postage labels or merchandise to purchase, select the "End Visit" button at the bottom of the screen.	
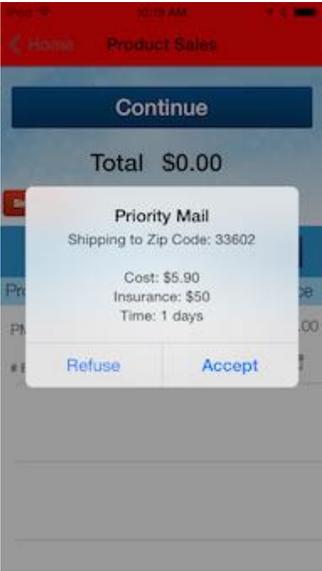
Processing Payment

Currently all purchases can only be paid for with credit card and non-PIN debit cards (i.e. debit cards that can be ran as a credit card, with a Mastercard or Visa logo). PIN debit cards, cash or checks are not accepted at mPOS. Similar to POS, purchases over $25 will require a signature. A copy of the signatures and transactions will be printed on the end of day 1412 so the mPOS user will not have to carry these in the lobby while conducting business.

1. Hold the customer's credit card so the magnetic stripe reader is facing the user of the device (i.e., lobby assistant) when swiping. 2. Swipe the credit card on the mPOS device 3. Enter the last four digits of the customer's credit card number for validation. 4. Check for a signature on the card per normal card handling procedures.	
5. For authorized transactions under $25, a customer signature is not required. A "Signature Line" will not display on the mPOS device. 6. For authorized transactions over $25, ask the customer to sign, using a finger or stylus, in the "Signature box" displayed on the screen of the mPOS device. 7. Verify that the customer has signed on the mPOS device and select the "Complete" button on the screen. 8. Provide the customer a choice of an email receipt and/or printed receipt.	

Mail Pickup

Mail Pickup option is used to scan as 'delivered' or 'refused' left-notice items. Only mail pieces not requiring money or payment can be scanned on mPOS (i.e. postage due or C.O.D are ineligible for mPOS and must be processed at the full service counter).

Collect Form 3849 from the customer, verify ID as appropriate, and retrieve the item from the staging area.

1. Select the "Mail Pickup" button on the Home screen.
 	
2. Scan the barcode on the mailpiece.
 	
3. If the customer decides not to pick up the mailpiece, select the icon "ø" to refuse the mailpiece. Selecting the check mark icon will change this back to 'accept'
4. Select "Continue" or "Next Mail Piece"
 	
    a. For mailpieces that require signature for pickup, the App will prompt for a signature and printed name.
 	
    b. When prompted, the address must be entered on the following screen for applicable services.	
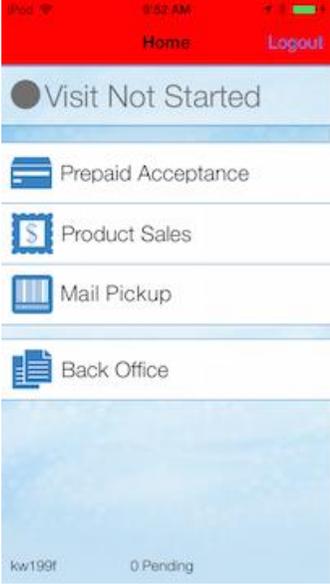
c. For Priority Express Mail pieces, an option to 'Waiver' will be available if signature is not requested. d. If applicable, mPOS app prompts for "Age Verification" and signature capture. 5. Repeat steps 2-4 for each customer pickup item. 6. If there is no merchandise to be purchased or other transactions, select the "End Visit" button at the bottom of the screen.	

Back Office

The Back Office functions includes reprinting or voiding transactions, printing reports, inventory functions, calibrating the label printer and for users with Supervisor Role, the ability to start a credit exam.

Reprinting a Receipt

Reprinting a receipt can only be done on the same day the transaction was conducted. This option will only allow a hardcopy paper receipt and will not give an option for email receipt.

1. From the Back Office, select "Transaction Log" 2. Select the "Customer Visit" from the "Transaction Log" (sorted by date and time). 3. Select "Print"
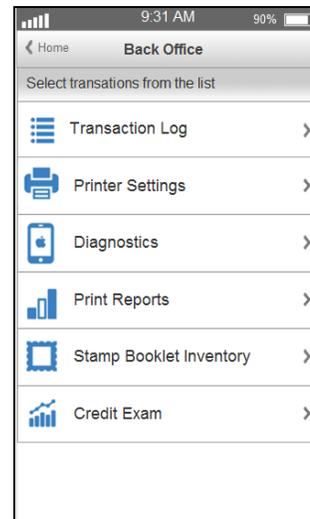
Printer Calibration

The label printer must be calibrated every time a new label roll is inserted and whenever the postage print is misaligned on the label.

To calibrate the label printer, the printer cannot be in the "auto-peel" mode. "Auto-peel" is when the front top bar is slid to the back of the printer towards the labels. Activating the "Auto-Peel" function will result in the postage labels coming off the roll without the liner backing. It is recommended that the label printer operate in "auto-peel" mode for best performance.

1. Set the printer so it is <u>not</u> in the "auto-peel" mode by pressing the two raised knobs on top of the printer and ensuring the bar is pushed to the front, away from the labels.

2. Ensure printer is powered on.

3. Under the "Back Office" function, select the "Printer Settings" option.

4. Select "Calibrate Label Printer." After a few seconds, the printer will automatically spool blank labels, and the message "Calibration Successful" will appear on the screen.

Auto-Peel bar

Diagnostics

When problems with the app or printers occur, the Diagnostics Report can be run and e-mailed from the mPOS app to assist the Help Desk with identifying the issue. The Diagnostics Report helps all pertinent device information as well as helps authenticate the issues the user is facing for better trouble shooting support. Contact the Help Desk to open a ticket prior to sending the Diagnostics report. The Help Desk will instruct the user if the Diagnostics report needs to be sent.

1. From the Back Office, select "Diagnostics"
2. When prompted, select "email" to send the report to the Help Desk.
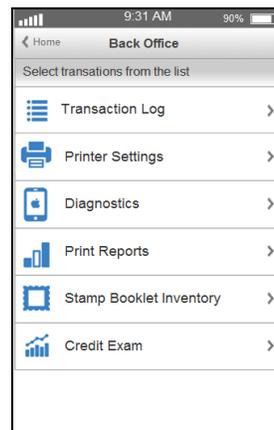
Print Reports

Two reports can be printed to show daily activity for the mPOS device. The Preliminary 1412 report will show the daily activity at the time of the printing. The Final end of day 1412 can also be printed from this option for the previous day as well as up to 30 days retroactive. Closeout is performed automatically every night at 11:40pm so the day's Final 1412 will not be available for printing until the next morning.

Preliminary 1412 1. From the Back Office, select "Print Reports" 2. For Preliminary reports, press "Preliminary 1412" to view or print totals anytime during mPOS working hours. 3. The generated report has "Trial 1412" printed at the top, shows the consolidated AICs for the mPOS unit.	
Final 1412 1. Each night mPOS will perform an auto close and capture AIC data for a final 1412. 2. The first user that logs on the next business day will be prompted to turn the printer on so that the 1412 for the previous day can print automatically. The 1412 should be filed in a dedicated mPOS folder with supporting documentation (i.e. voided labels, PS Form 3533) 3. To print prior day 1412s up to 30 days retroactive, use option "Print Reports" and End of Day Final 1412" 4. Select the date for the report you want to print.	

Stamp Booklet Inventory

Receiving stamps into the mPOS

The mPOS finance number is a separate accountability from the POS. Therefore, stamps will have to be transferred from POS to the mPOS finance number and then picked up on the mPOS device. Stamps for mPOS cannot be ordered directly from SFS Web to be shipped to the mPOS 10 digit finance number. They must be transferred from the POS inventory. POS instructions for transferring stamps to mPOS can be found in Appendix 2.

Any mPOS user will be able to accept stamp transfers into the mPOS device. The POS generated PS 17 with shipment number is needed in order to accept the stock. Verify stock received with a witness and sign the PS Form 17.

Attach the shipment receipt generated on the mPOS printer to the PS Form 17 generated from POS and file locally.

1. From Back Office select "Stamp Booklet Inventory". 2. Select "Receive/Return Stamp Booklets" 3. Ensure "Receive" is highlighted. Fields for Shipper Location ID and Shipment Number should be shown. 4. Enter the shipper location ID 5. Enter the shipment number from POS generated PS Form 17 6. When correct number of digits has been entered, select "Next". 7. Select stamp item number received and enter quantity	
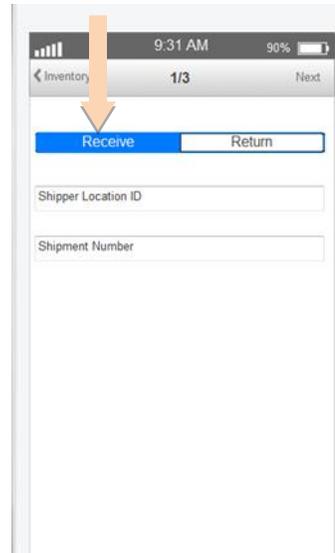
8. Confirm quantity received 9. If correct, select "Print Receipt and Complete" 10. If incorrect, return to previous screen by selecting 'back' and correct.	 9:31 AM 90% ‹ Back 3/3 Total Amount Received: $294.00 Shipper Location ID XXXXXXXXX Shipment Number XXXXXXXXX Four Flags Forever / 20 Total Booklets: 20 Christmas Forever / 20 Total Booklets: 10 Print Receipt and Complete Please make sure your printer is turned on!
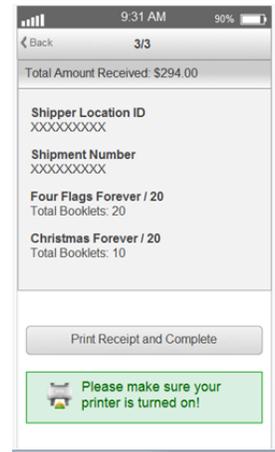
Return the stock from the mPOS Unit to POS Unit

Any mPOS user will be able to return stamps from the mPOS device to the POS unit. Record returned stamps on a manual PS Form 17, the mPOS will generate a shipment receipt. Attach the shipment receipt generated on the mPOS printer and the POS generated shipment received receipt to the manual PS Form 17 and file locally.

1. From Back Office select "Stamp Booklet Inventory". 2. Select "Receive/Return Stamp Booklets" 3. Select "Return" to change the option. Destination Location ID field should be shown. Device Location is default. 4. Enter 10 Digit Finance number of the destination location (POS office finance number) 5. Select stamp item number received 6. Enter and confirm quantity received 7. If correct, select "Submit" 8. If incorrect, return to previous screen by using 'back' and correct.	 9:31 AM % ‹ Inventory 1/3 Next Receive Return Device Location: XXXXXXXXXX Destination Location ID
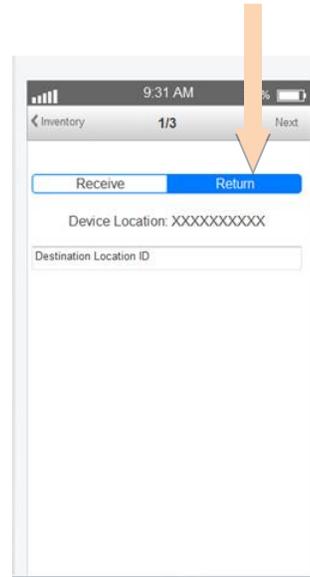
Ship to Own is used when making corrections when stock was picked up incorrectly, posting to AIC 848 • Unit picked up for an incorrect item number • Unit picked up the wrong amount that results in an overage • Unit picked up using the incorrect shipment number Contact the Accounting Help desk for any questions on correcting stock shipments.	
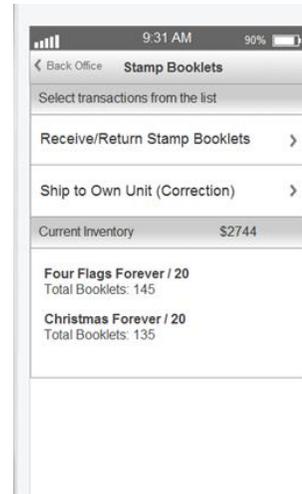
mPOS Stamp Counts

The Supervisor Role is needed to be able to initiate a credit exam on mPOS. The Supervisor Role for mPOS must be requested through eAccess.

Credit exams must be conducted by two employees (at least one with mPOS Supervisor Role) and are required quarterly. Manual PS Form 3294, *Cash and Stamp Stock Count and Summary* must be used to record the count. The results will then be entered into the mPOS device and also recorded on PS Form 3368, *Accountability Examination Record.*

Both the Supervisor and a designated employee must complete an independent PS Form 3294.

AIC 221 (overage) or AIC 621 (shortage) will post automatically to the mPOS 1412 when the credit exam is accepted using the mPOS device

Conducting the count
1. On manual PS Form 3294, obtain the closing balance as reported in AIC 853 on the mPOS last Unit PS Form 1412, and record the amount in the section Stamp Credit as reported in AIC 853, under Cash/Stamp Stock Credit Count Summary.
2. Count each item of saleable stock and enter the item number, value, and quantities in the appropriate blocks on page 2 of PS Form 3294.
3. Multiply the total quantity of each item by its unit value.

4. Total all the blocks and enter the results to Total Stamp Stock at bottom right corner of page 2 on PS Form 3294.

5. Transfer this figure to Total Stamp Stock as Counted (line 2) under Cash/Stamp Stock Credit Count Summary, on page 1 of the form.

6. Calculate the Difference by subtracting the amount reported for Stamp Credit as reported in AIC 853 from last eMoves PS Form 1412 (Line 4) from the amount reported for Total Stamp Stock as Counted (Line 2).

7. Record the Difference on Line 5. A negative amount is a shortage and a positive amount is an overage.

8. Enter the count results on the mPOS device

1. Navigate to Back Office 2. Select "Credit Exam" a. This option will be greyed out if User does not have the Supervisor Role 3. Print shipment receipt 4. Enter counter 2's ID 5. Enter counter 2's password	
6. Select the stock to count 7. Enter the count 8. Select continue if count is correct 9. Counter 1 selects "I Agree" 10. Re-enter counter 2 password 11. Counter 2 selects "I agree"	
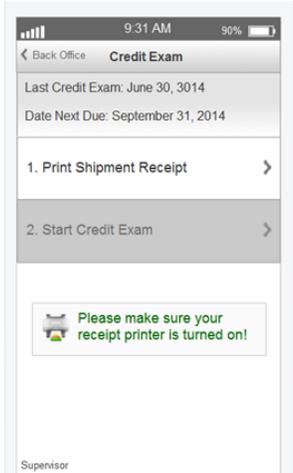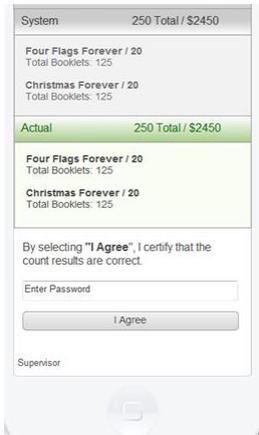
12. Counter 1 enters comments if any 13. Counter 2 enters comments if any 14. Select continue 15. Print shipment receipt	
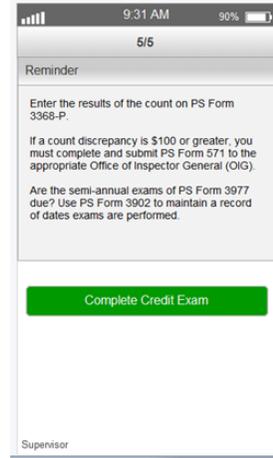
After each count, attach the Daily Log with stamp entries from quarter to PS Form 3294, record results on PS Form 3368, *Accountability Examination Record* and file paperwork locally, in a separate folder for mPOS stamp counts.

Refund and Voids

Policy

Create a file folder to track all mPOS voids/refunds. Keep records in this file with all other daily mPOS documents. PS Form 3533 must be completed for the mPOS void/refund document file. This folder is intended as a tool for management analysis of refund activity.

mPOS Postage Labels

- **No cash refunds are allowed, exchange for equivalent value stamps only or perform credit card reversal.**

- mPOS postage labels may not be reused, modified or cut.

- mPOS postage labels removed from letters and packages will not be accepted.

- Exchanges will be at 100% of value.

- Obtain label from customer and physically mark it as void.

- Complete a PS Form 3533 with signature of the mPOS user and submit and store with Unit End of Day reports and PS Form 1412.

mPOS labels may not be sold for future use. The printing of the label includes an Acceptance scan sent to Product Tracking System (PTS). Therefore, the label must be applied to packages that are ready for mailing and acceptance.

mPOS Label Voids/Refunds

This process is used when the mPOS device prints a label and it is damaged, a customer changes their mind prior to swiping credit card, a credit card is declined, or the customer decides to cancel mailing following the credit card approval but prior to mPOS being closed for the day.

The mPOS device will automatically post the postage meter label sale to AIC 119 and 551 after following the steps below on the mPOS:

If the payment has not been made or the card declined:

1. Cancel the label transaction by tapping the Trash can icon on the desired product row.

If the payment has processed:

1. If the payment has taken place, go in to "Back Office" and the "Transaction Log". Locate the transaction to be voided (use the time of transaction if unsure).
2. Press "Void" to void the transaction. Note: the customer will need to provide the same credit card used in order to void a transaction.
3. On the "Confirm Void" screen, swipe the customer's credit card through the credit card swipe reader on the bottom of the mPOS Device.
4. Enter the last 4 digits of the customer's credit card number and tap "Submit".
5. If successful, the mPOS returns the User to the Transaction Log screen and displays "zero" for all items.
6. Indicate on the customer's receipt that the item has been refunded/voided, initial and date. A voided receipt can be printed if desired.

For electronic postage labels for Priority Mail Flat Rate mail pieces (only), mPOS sends a void transaction to Stamps.com. mPOS returns a Success/Fail message to alert the user to the completion of the postage void. The mPOS user must remove the electronic postage label from the customer's mailpiece and write "VOID" across the label.

Physically take the electronic postage label and apply to a PS Form 3533. Mark or write void/spoiled across the label. If the label did not print correctly, indicate the intended amount on the label and reason (i.e. label jam)

At the end of the employee's mPOS shift, print an mPOS sales report and match the amount in AIC 551 with the amount of spoiled labels attached to PS Form 3533s to

ensure they match for supporting documentation. If they do not match, research must be conducted and the issue corrected.

File the PS Form 3533 forms with the mPOS sales report attached showing amounts match, with the daily mPOS paperwork.

Since generated labels will show in PTS, these can be 'recalled' by using an IMD handheld scanner to expunge by scanning as 'customer recalled'. Scan the barcode and select "C" Customer Recall on the IMD. This can only be performed if the label exists and is legible. There is no workaround for labels that did not print or are illegible.

For label refunds after mPOS Final 1412 close out, follow workflow process for refunds of postage in POS using a PS Form 3533. No Cash Refunds.

Stamp Booklet Exchange

No Cash refunds, exchange for equivalent value stamps only.
- Exchanges may only be made at the office where purchased.

Full Service Window POS ONE
- The Retail Associate will utilize the **Exchange Stamp Products** option in the POS ONE system.
- Enter the value of the stamps to be exchanged as a **1-**cent "Redeemed Stamp".
- Attach "Redeemed Stamp" to a sheet of paper and submit at closeout to be placed in redeemed stock location in retail floor stock.
- Enter or scan the item number and quantity of replacement stamps.
- Issue the customer the replacement stamps of the same value.

Stamp, Retail or Packaging Product Voids

Prior to tender:
If the customer changes their mind before tendering the credit card, the mPOS user will void the transaction out of the shopping cart on the mPOS device by:
1. On the Home screen, tap the "Cancel Visit" button.

-- or –

On the Shopping Cart screen, tap the "Trashcan" icon on the desired product row

-- or –

On the Shopping Cart screen, set the quantity for the item to 0.
2. Next, tap "Yes" to confirm the item deletion.

After tender:

If the customer changes their mind <u>after</u> the credit card has been approved, the mPOS user will void the transaction using the follow steps:

1. Go to the Home screen.
2. Tap the "Back Office" button.
3. Select the "Recent Transaction" from the "Transaction Log" (sorted by date and time).
4. Tap the VOID button for the transaction.
5. On the "Confirm Void" screen, swipe the customer's credit card through the credit card swipe reader on the bottom of the mPOS Device.
6. Enter the last 4 digits of the customer's credit card number and tap Submit.
7. If successful, the mPOS returns the user to the "Transaction Log" Summary screen and displays "zero" for all items.

Lobby Processes

In offices with the mPOS device, the mPOS user should:

- Actively engage customers to determine customer needs.
- If there is queue for full service counters, first priority is to engage customers in line to help shorten Wait Time In Line.
- If there is no queue for the full service counters, engage customers as they arrive in the lobby.
- Redirect customers with eligible transactions that can be served by a Self Service Kiosk (SSK), if available.

Screen customers to identify if the customer has only eligible simple transactions that can be performed on the mPOS:

- Stamp Booklet sales
- Non-revenue mail pickup with a ps3849
- Prepaid mail needing an acceptance scan (excluding customs and Priority Express items)
- Priority Mail Flat Rate postage sales
- Readypost or Greeting card sales
- Customer must use a credit card or non-PIN debit card

Safeguard mPOS device and keep in the mPOS user's vest or clipped to belt during working hours. Safeguard mPOS stamp booklets, utilizing the provided money belt or closed pouch.

If customers cannot be helped with the mPOS device or directed to the SSK, ask questions in order to prepare their transaction before they queue, reducing the number of unprepared customers that reach the counter (refer to Lobby Assistant SOP on Retail Operations web page for full instructions).

Always ask the customer if there are other products they may be interested in purchasing, such as stamp booklets or shipping materials for future needs. The mobility of mPOS allows the mPOS handler to upsell products by introducing new items located throughout the retail lobby.

Smile and be pleasant, offer assistance by asking questions to determine if the transaction is mPOS eligible.

- "Do you have a credit card that you can use for your business today?" If so, this could be an mPOS eligible transaction if the entire mailing is mPOS eligible. Debit cards can be used if they can be scanned as a non-PIN transaction.

- If the customer does not have anything in their hands, ask if they are purchasing stamps and if so, ask if the current mPOS booklets on hand are acceptable.

- "Are those prepaid packages you would like to drop off for acceptance scans?" If so, this would be an mPOS eligible transaction.

- If the customer has a form 3849 or PO Box notice in their hands ask "Are you here to pick up mail?" If so, this may be an mPOS eligible transaction, if non-revenue.

- "Are you here to purchase mailing products or greeting cards?" If so, this would be an mPOS eligible transaction.

- If the customer is shipping using a Priority Mail Flat Rate box or envelope, postage can be purchased using the mPOS device.

If the customer indicates that only part of their visit includes an mPOS eligible transaction (i.e. Stamp booklet and P.O. Box rental), then allow the customer to conduct the entire transaction at the full service counter or SSK (if eligible). Assist the next customer. Do not have the customer conduct split or multiple transactions.

If the transaction is not fully mPOS eligible or the customer chooses to use the full service counter, the mPOS user can assist with ensuring the customer is prepared with proper packaging and forms in order to reduce the time spent at the counter.

NOTE: VERY IMPORTANT – **Before diverting a customer from the full service line, it is imperative that the mPOS user:**

- Asks the customer if they can pay with a credit card or non-PIN debit card.
- Ensures the entire transaction is mPOS-eligible.
- Ensure that the transaction will meet the minimum one dollar requirement for self service kiosks.

Product Sales on mPOS

mPOS user should carry between 10-25 stamp booklets in a secure location, either in a money belt or other pouch secured to the mPOS user. The stamps should not be able to fall out of a pocket/pouch, if bending over.

The mPOS user can scan the stamp booklets, ReadyPost, greeting card and/or retail product (excluding AIC 092 Philatelic items) on the mPOS device, then total. The credit card should be swiped by the mPOS user and the last 4 digits entered.

The device will only prompt for a signature if the total dollar amount is over $25. If so, the customer is prompted to sign on the device with a finger. The option is given if the customer chooses a hard copy receipt and/or to have an email receipt, both or neither.

The customer will enter their email address if the soft copy option is chosen. The hard copy receipt will print out (if chosen) and is given to the customer.

The USPS credit card copies are not printed out until the end of the day's business, at closeout. The USPS credit card copies should be kept in a secured location with the mPOS and eMoves 1412 reports, to be retained for the same amount of time as POS credit cards (currently two years).

Prepaid mail acceptance on mPOS

When a customer presents a prepaid article with online postage, the mPOS handler should scan the item on mPOS as accepted. A receipt will be generated which will be handed to the customer. The package should be marked with a line through the postage with a yellow highlighter to indicate the package has been scanned as accepted to avoid duplicate scans. The package can be placed in the Self-Service Kiosk parcel drop in the lobby, or other designated secured location if lobby drop is unavailable. Packages scanned as accepted on the mPOS device do not need any other acceptance scan and can be dispatched accordingly.

For prepaid metered Priority Mail articles not generated online, the mPOS handler should attach a label 400 and scan the label 400 as accepted. A receipt will generate with the label 400 number which will be given to the customer.

Items requiring a customs form should not be accepted in mPOS since these items need to be entered into CPMAN. Direct these customers to the full service window.

Priority Express Mail items cannot be accepted in mPOS due to the service commitment requirements. Direct these customers to the full service window.

Mail Pick-Up for mPOS

If a customer has received a PS Form 3849 notice for mail pick-up or a PO Box notice, determine if the article is non-revenue and does not require a cash transaction (i.e. postage due, C.O.D)

The following Mail Pick-Up items can be scanned as delivered using the mPOS:
- Priority Mail Express
- Tracking numbers
- Insured
- Certified (requires customer to enter address)

Mail Pick-Up items that *cannot* be scanned on mPOS:
- Collect on Delivery (COD)
- Postage Due or BRM
- Business Reply Mail
- Registered

The mPOS user should retrieve the item or contact someone in the back to retrieve (based on local policy). Once item is retrieved, the item barcode should be scanned. The customer must sign for accountable items on the mPOS device when the article is delivered. Customer prints and signs their first initial and last name. For Certified mail articles, the customer's address is also required to be entered.

Priority Mail Flat Rate Postage

If a customer has a Priority Mail Flat Rate box or envelope that needs postage, the mPOS handler can process the article using the mPOS device. Inform the customer that Priority Mail includes automatic insurance up to $50 and tracking. Ask the customer if they need additional insurance. If the customer does not want additional insurance, process on the mPOS if customer is using a credit card or non-PIN debit card. Direct customers desiring additional insurance to the SSK or full service counter

Once the postage is printed and applied, the mPOS handler must deposit the mail in the inner lobby parcel drop or other locally designated secure location. The article is considered 'accepted' and should not be left unsecured in the lobby or returned to the customer. If the customer is not ready to mail the item, the postage will have to be voided, and placed on a PS Form 3533 to be turned in at the end of the shift.

Priority Mail Flat Rate postage is 'accepted' when printed and does not need to be scanned as accepted again.

Postage cannot be processed on mPOS for non-Flat Rate variable weight items. Likewise, postage for Flat Rate articles that need additional insurance or any other special service cannot be printed on the mPOS.

Postage labels should only be printed for items that are ready to be mailed. Do not print postage for future use since an acceptance scan is generated in PTS when printed. The postage label printer can be mounted on a cart or counter within easy range for the mPOS handler. The postage printer should not be left unsecured on a table in the lobby.

Identity Proofing Service (IPS)

mPOS devices will have a separate App that can access a new service that will be rolled out in FY 15. This App may not be available on all mPOS devices initially. Post Offices will be notified when this becomes available in their locations.

Identity Proofing Service (IPS) In Person Proofing

IPS is a service that allows customers to upgrade their USPS.com accounts to a higher level of assurance. Customers will first attempt to complete this process remotely from their personal computer. Customers that are unable to complete the process remotely will be directed to a retail Post Office to attempt In Person Proofing. To complete this process in-person, the customer will need to bring:

- Confirmation email with barcode

- Primary form of identification (photo ID). Acceptable forms of photo ID are:

    o State Driver's License

    o State Non-Driver's ID Card

    o Uniformed Service ID Card

    o Passport

- Secondary form of identification. This is only necessary when the primary form does not contain a current address or does not contain an address at all. Acceptable forms of secondary identification documents.

    o Lease, Mortgage, or Deed of Trust

    o Voter or Vehicle Registration Card

    o Home or Vehicle Insurance Policy

Once Post Offices are notified that they will be accepting IPS customers, this list of locations will be shared with customers needing this service. This service will only be available on mPOS devices (not POS) initially. Therefore to be able to assist IPS customers, the mPOS device and a trained employee should always be available during normal business hours, even if the mPOS is not being used in the lobby.

To access the IPS App, the USPS app will need to be closed out by double clicking on the home button and swiping up on the open USPS App screen. The new IPS app can be opened by selecting the icon.	
At the IPS App login screen, enter your ACE ID and password. Select the "Sign In" button to start the IPS application.

Note: User roles to IPS are active once requested and approved through eAccess. | |

If your login is unsuccessful, you will be presented with this error screen. Make sure you enter your ACE credentials correctly and that you are approved for IPS in eAccess.	**UNITED STATES POSTAL SERVICE** In-Person Proofing **Sign Into Your Account** Restricted System Access ⊖ **The ACE ID and/or password you have entered is incorrect.** **ACE ID** Enter ACE ID here **Password** Enter password here *For login assistance, contact the USPS Help Desk at 800-ASK-USPS® (800-275-8777).* Sign In
Ask the customer to present their confirmation barcode. Select "Scan Barcode". If the barcode is unable to be read, enter the barcode numbers manually and select "Submit". Note: Try to scan the barcode before entering the numbers manually. If the scan is unsuccessful, there will be an option to return to this screen and manually enter the barcode numbers.	**UNITED STATES POSTAL SERVICE** In-Person Proofing **Barcode Scan** Scan the barcode provided by the customer to start the proofing process. Scan Barcode If you cannot scan the barcode, enter the barcode numbers below. **Barcode ID** 10 digits Submit 1 2 3 4 5 6 7
Scan the photo ID barcode by pressing the button on the right side of the mPOS device. Scanning the confirmation barcode should locate the Customer's IPS record. If the scan is unsuccessful select "Enter Barcode Manually"	**UNITED STATES POSTAL SERVICE** In-Person Proofing Scan the barcode by pressing the button on the right side of the device. Enter Barcode Manually
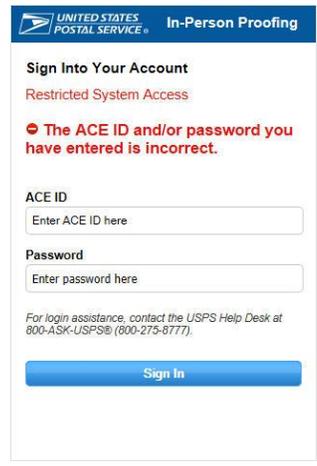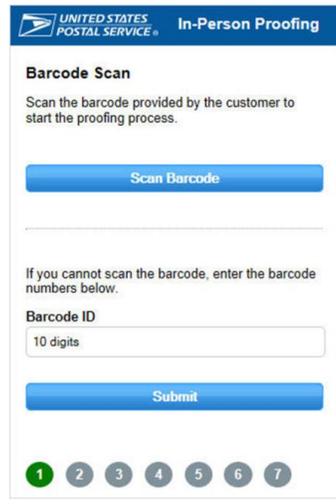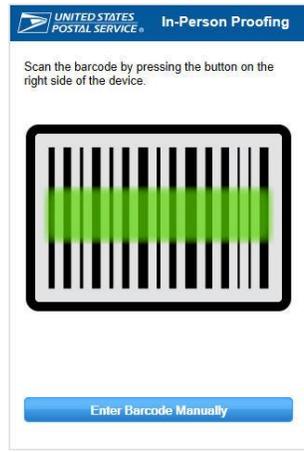
|	
If the customer's identity has already been verified, an error message will indicate that the proofing even has already occurred. If the customer believes that they have not been successfully proofed, select "Retry Scan" and attempt to scan their barcode.	**UNITED STATES POSTAL SERVICE ®** In-Person Proofing ⊖ **Proofing event has already occurred.** This customer's identity has already been verified. If the customer believes this is incorrect, please retry scanning the customer's barcode. **Retry Scan** **New Transaction** **Sign Out** ① ② ③ ④ ⑤ ⑥ ⑦
If the customer is not eligible for an In Person Proofing, the application will present an error stating the customer record is not in the system. Confirm that the customer attempted remote proofing but was directed to in person proofing. Select "Retry Scan" to scan the customer's barcode again. If the application still cannot locate the Proofing Event, request that the customer generate a new confirmation email and scan the new barcode.	**UNITED STATES POSTAL SERVICE ®** In-Person Proofing ⊖ **Proofing event not in system.** This customer is not registered for a proofing event. Please retry scanning the customer's barcode. **Retry Scan** **New Transaction** **Sign Out** ① ② ③ ④ ⑤ ⑥ ⑦
If the barcode was successfully scanned, the Customer's name should appear in the "Name" field. Ask to see the Customer's photo ID. • Check to make sure the Customer matches the photo. • Check to make sure the name on the ID matches the name on the screen. • Check to make sure the photo ID has not expired. Select "Next" to scan the photo ID barcode.	**UNITED STATES POSTAL SERVICE ®** In-Person Proofing **Request Identification** **Name:** User, Test Ask the customer for identification to scan on the next screen. **All forms of identification must be current.** Accepted forms of identification… • State driver's license • State non-driver's identification card • Uniformed services identification card • Passport Accepted secondary forms of identification… • Lease, mortgage or deed of trust • Voter or vehicle registration card • Home or vehicle insurance policy *Secondary forms of identification are only required when the primary identification does not list an address or has an outdated address.* **Next** ① ② ③ ④ ⑤ ⑥ ⑦
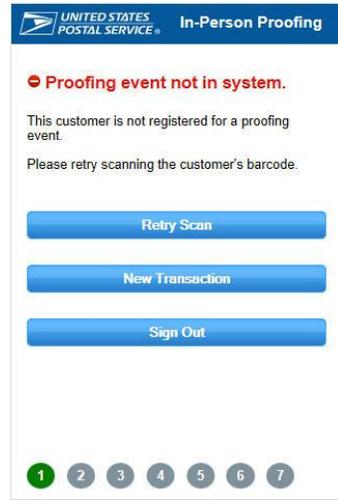
Select the form of identification to scan	
Scan the photo ID barcode by pressing the button on the right side of the mPOS device.	
If the address scanned on the photo ID does not match the address on file, the IPS application will present an error alerting you to request a secondary form of ID. Select the secondary form used to verify the customer's address.	
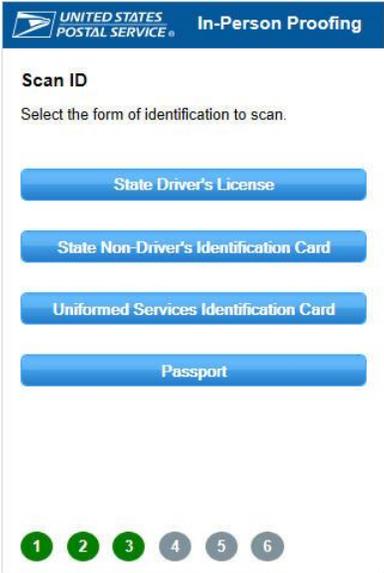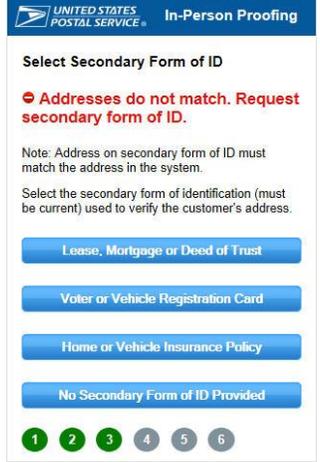
|	
If the customer does not have a photo ID with their current address, ask them to present a secondary form. Select the secondary form used to verify the customer's address. Note: The address on the secondary form of ID must match the address in the system.	
Validate that the address on the customer's secondary form of ID matches the address shown on the screen. If the information on the customer's form of identification matches, select "Yes". If the information does not match, select "No".	
Validate the customer's date of birth. If the information on the customer's form of identification matches, select "Yes". If the information does not match, select "No".	

If the identity validation is successful, the IPS application will present an Identity Validation Complete screen. Inform the customer that the proofing is complete and that they will receive a confirmation email. Print the validation proofing confirmation code by selecting "Print Confirmation Code".	**In-Person Proofing** **Identity Validation Complete** Please inform the customer that the proofing is finished and that they will receive a confirmation email. Print the validation proofing confirmation code and give it to the customer for reference. **1234567890** The customer can now log into the USPS application and continue the validation process. **Print Confirmation Code** **Continue**
If you suspect that the person is attempting fraudulent identity verification, select "Suspected Fraud". No other action is needed. To begin new identity verification, select "New Transaction". If you are finished with the IPS application, select "Sign Out".	**In-Person Proofing** **Additional Options** If you suspect that this identity verification procedure was fraudulant, flag that transaction as suspected fraud. **Suspected Fraud** **New Transaction** **Sign Out**
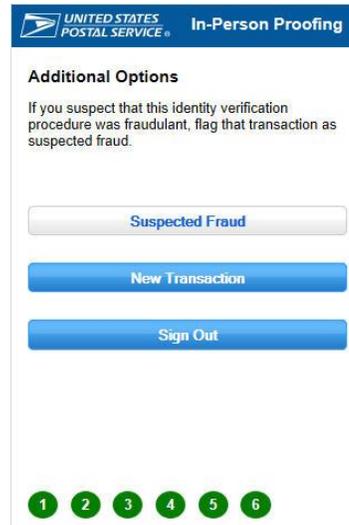
Frequently Asked Questions (FAQs)

1. What should I do if the device stops functioning in the middle of a transaction?

Examples of the device not "functioning" include the following:

- *The barcode scanner has stopped working (i.e. the lights from the barcode scanner no longer flash when trying to scan).*

- *There is no response from the mPOS app when a selection is made (i.e. buttons are being pressed, but the app seems "frozen.")*

First, check the device for its battery level. The battery icon indicating its level is located under the "Logout" button on the app. If the icon shows 0%, the mPOS device must be charged before continued use. If the battery icon shows a charge of 50% or more, proceed with the following steps.

To restart mPOS App software: Press the "Home" button at the bottom of the device, twice. You will see a short screen at the bottom of your window pop up. Hold the "mPOS" App icon at the bottom of the screen for 2 seconds, until you see the App icon jiggle. Select the jiggling mPOS App with the red box at the upper left hand corner of the icon. It should disappear from the pop up box at the bottom of the screen.

Select the "Home" button again to take you to the device Main screen.

If restarting the mPOS App software does not appear to have changed the status of the device, proceed with restarting the mPOS device, as directed below.

To restart mPOS device hardware: If the steps to restart the mPOS App software do not work, a hard restart of the device must be performed. Hold the "On/Off" button down for 5 seconds until you see the screen to power off.

Slide the red arrow button, at the top of the screen, to the right to power the device off. Wait until the screen turns black.

The restart the mPOS device, hold the "On/Off" button down for 5 seconds for the device to turn on.

2. Who is my point of contact if I have questions about the device or need help with completing a transaction?

Call 1-800 – USPS – Help for technical issues. At the voice prompt, say "mobile point of sale" or "mPOS"

For questions on inventory adjustment or stamp counts, call the Accounting Help Desk at 1(866) 974-2733

3. Does the device have to be cradled at the end of the day?

The mPOS device should be cradled when not in use for extended times and at the end of the business day to keep the battery charged. Cradling does not transmit any information from the device itself.

4. Where do I store the device when I am not using it?

When the device is not in use or needs to be recharged, the device should be stored in the charger, in the designated safe location in the back office.

When helping customers with the mPOS device, the device can be temporarily stored in the mPOS user's vest or holster. The mPOS device should always be within an arm's reach for device security and promptness in responding to customer needs.

5. Can I mount the printer under the parcel slide to avoid carrying it?

No, the printer should not be mounted. The printer should be set on the mPOS user's work counter or in the mPOS user's vest. The printer should always be within an arm's reach for device security and promptness in responding to customer needs.

6. Can a customer purchase something from the mPOS user and the window and complete the sale on the mPOS?

The mPOS user should only assist customers who have complete transactions that can be completed on the mPOS device. Customers will be inconvenienced if they have to split their transaction on mPOS and at the retail window. There are no time savings, and there is a greater chance of confusion sorting out customer orders.

7. What LDC code should be used when performing lobby assistance with the mPOS device?

Lobby Assistants should use LDC 45 OPN 352 when in the lobby assisting customers.

8. Will the mPOS transactions earn WOS credit in CSV or RDM?

Historical data is needed to determine proper WOS credit. Since the mPOS technology is new, this data will be collected 52 weeks after full deployment and analyzed in order to properly assign credit.

CSV feeds for mPOS data is currently being established in order to allow LDC 45 credit to be earned for mPOS. Development will be complete in FY 15.

9. Who should we notify if the item is lost or stolen?

In the event the device or any peripherals are lost or stolen, immediately notify the contacts below:

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1. NOTIFY: USPS Computer Incident Response Team (CIRT) Hotline

Phone: 1-866-877-7247   Outside US: 00-1-919-501-9299   Email: uspscirt@usps.gov

2. NOTIFY: USPS Inspection Service – Local Office where the incident took place.

Phone: 1-877-876-2455   http://www.usps.com/ncsc/locators/find-is.html

3. NOTIFY: . mPOSSupport@usps.gov

Appendix 1 – Daily Log

mPOS Daily Log						Location:		
Date	Time Out	Time In	Stamp Quantity Out	Stamp Quantity In	Total booklets sold	Employee Name	Employee Signature	Suprv Initials
Store this log in the safe area with mPOS equipment. Review log daily to insure no information has been omitted or changed. File with quarterly credit exam results onsite in separate file.								

Appendix 2 – POS to mPOS Stamp Transfer Instructions

NOTE: mPOS is authorized to sell only specific item numbers for stamp booklets. Contact the District Retail Office or Area Retail Equipment Coordinator for list of mPOS eligible booklets.

Stock Custodian signs on POS to transfer stock and completes these steps:

1. Access Back Office

2. Select **<Inventory Options>**

3. Select **<Inventory Transfers>**

4. Select **<Return Stock>**

5. Select **<Initiate New Return>**

6. Scan or key an item number of select authorized items, then press **[Enter]**

   ➢ **Current Flag booklets**

   ➢ **Current select holiday booklets**

7. Select **<Continue>**

8. Key the quantity being shipped, then press **[Enter]**

9. Select **<Continue>**

10. Select **<External PO / Unit>**

    Note: When you select **<External PO / Unit>** the shipment number is automatically generated by the system.

11. Key the Destination Location ID (mPOS finance number) <u>XXXXXX-750X</u>, then press **[Enter]**. (Contact your District Retail Manager if you do not know you mPOS finance number.)

12. Select **<Accept This Return & Continue>**

13. To complete the return, select **<Print and Send Return>**

14. The Shipment Acknowledgement and PS Form 17 prints.

15. Select **<Continue>**

Stamps and POS generated PS Form 17 should be verified and accepted by mPOS user for entry into mPOS device.

Appendix 3 – POS Stamps Return Instructions

Stock Custodian signs on POS to transfer stock:

1. Access Back Office

2. Select **\<Inventory Options>**

3. Select **\<Inventory Transfers>**

4. Select **\<Return Stock>**

5. Select **\<Initiate New Return>**

6. Scan or key an item number of select authorized items, then press **[Enter]**

   > **Current Flag booklets**

   > **Current select holiday booklets**

7. Select **\<Continue>**

8. Key the quantity being shipped, then press **[Enter]**

9. Select **\<Continue>**

10. Select **\<External PO / Unit>**

    Note: When you select **\<External PO / Unit>** the shipment number is automatically generated by the system.

11. Key the Destination Location ID (mPOS finance number) <u>XXXXXX-750X</u>, then press **[Enter]**.

12. Select **\<Accept This Return & Continue>**

13. To complete the return, select **\<Print and Send Return>**

14. The Shipment Acknowledgement and PS Form 17 prints.

15. Select **\<Continue>**

Stamps and POS generated PS Form 17 should be verified and accepted.

Appendix 4– POS Instructions for Processing Refunds

Full Service Window POS ONE System process

This requires a 2-Step process:
First Step:

   a. Select Domestic Mail screen.

   b. Scan the item(s) barcode of the replacement stamp(s).

   c. Select <Accept>

   d. Verify that the amount is the same amount of the mPOS Postage Label

   e. [Payment or End of Visit],

   Note: Do not issue the stamps to customer until you finalize the Second Step.

Second Step:

   a. Press [Clerk Services / Back Office].

   b. Select <Money and Accounts>>>>.

   c. Select <GL Activity>>>>.

   d. Select <GL Adjustments>.

   e. Enter AIC 551, select <Accept>

   f. Key Amount of the mPOS Postage Label, press [Enter].

   g. Select <Accept & Continue to Offset AIC Entry>.

   h. Enter Offset AIC 752 for the offset AIC.

   i. Select <Accept>

   j. Verify that the adjustment is the correct amount. It's displayed in the Notebook Area.

   k. Select <Yes, accept Adjustments>

   l. Print a POS receipt

Attach the POS receipt and the mPOS Postage Label to the completed and signed (customer & Retail Associate signatures) PS Form 3533. Issue the customer stamps for the same total value. Submit the PS Form 3533 with receipt and mPOS Postage Label at closeout.